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FinancialPlanning

Wealthtech Weekly

April 3, 2025

By Rob Burgess
Reporter

If you're an advisor trying to land and keep bigger clients, how do you distinguish yourself? For Grant Blindbury, partner at FMB Wealth Management, the answer was to find tech products that helped address specific issues. In the latest edition of "Show Me Your Stack," he told me how a distinct client-facing tech stack, including a less common tool for financial planning, paid off.

Do you use similarly specialized tech? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

How to land bigger clients with deliberate tech: Show Me Your Stack

Grant Blindbury of FMB Wealth Management said staying away from well-worn client-facing financial planning solutions has helped his firm separate itself from the pack.

- **This is the biggest cybersecurity vulnerability firms face**
  Advisors have all the most sophisticated cybersecurity applications available on the market, but experts say they can't stop the biggest weakness out there.
- **Why and how wealth firms should own their data**
  Experts say that while data ownership might at first be time-consuming and costly, the long-term benefits make it an extremely worthwhile investment.
- **Envestnet's Dana D'Auria opens up about personalization, tariffs, AI**
  As group president of Envestnet Solutions and co-chief investment officer at Envestnet, D'Auria is responsible for research, overlay, direct indexing, sustainable investing and retirement services.
- **How advisors can help clients with opioid use disorder**

Experts say financial advisors can play a critical role for clients who are in the throes of addiction and those sifting their way through the often-challenging recovery process.

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